Docket/App No.: 3183.1000-001 Title: System and Method for Measuring...
Inventors: Kin Chung Fung et al.

Inventors:

1/23

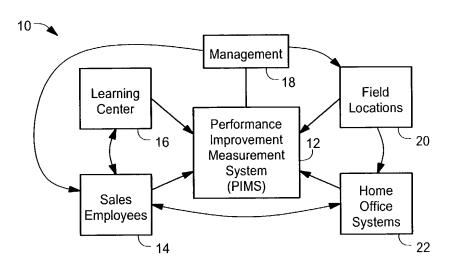


FIG. 1

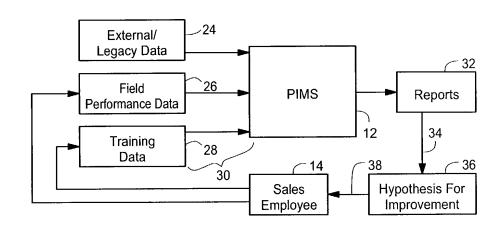
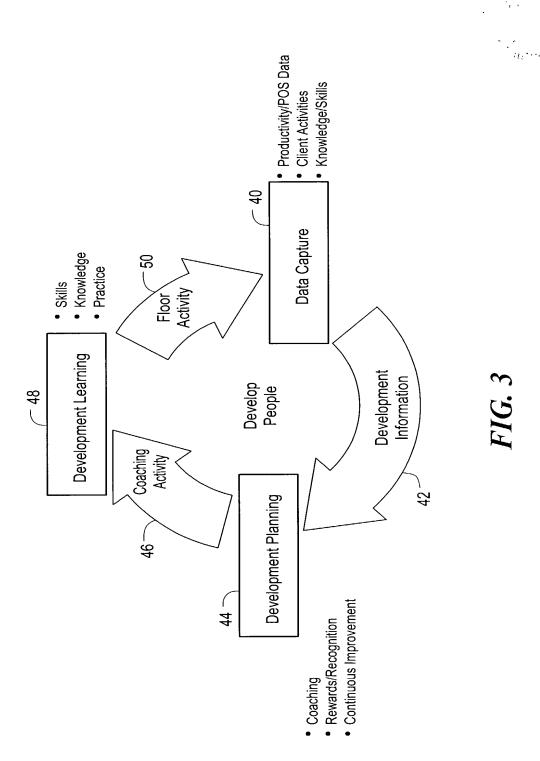


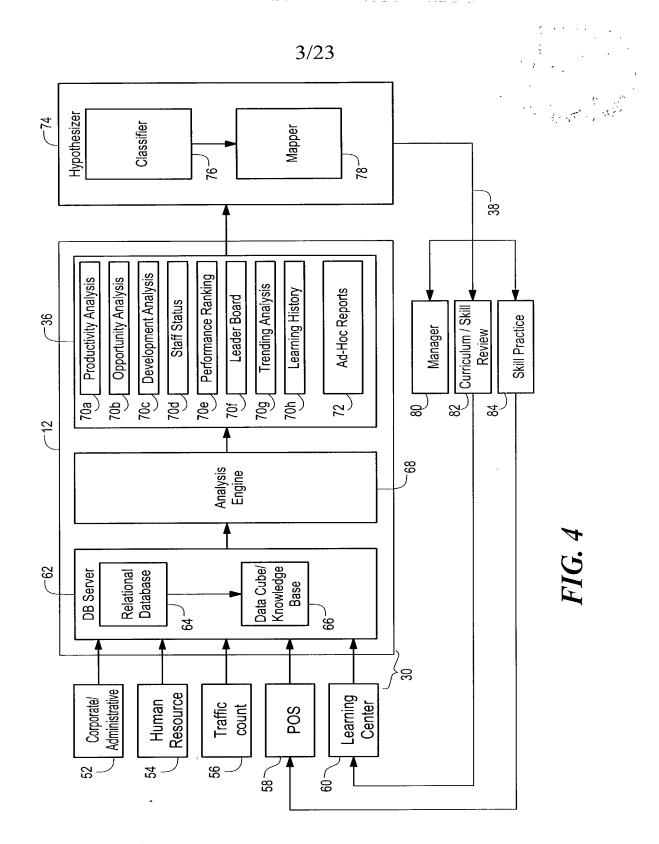
FIG. 2

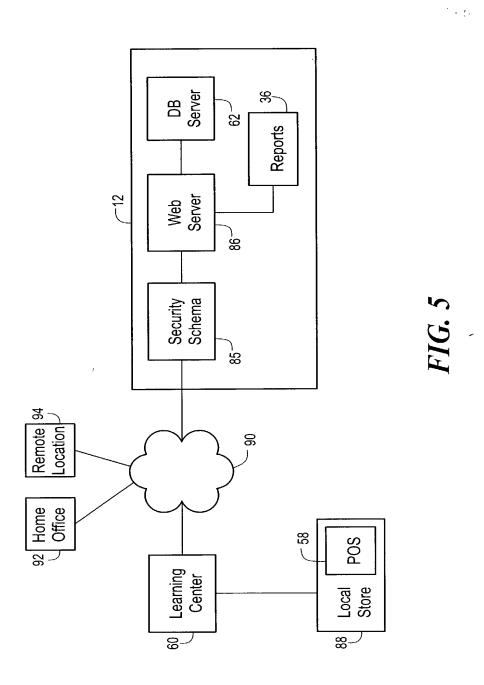
Docket/App No.: 3183.1000-001 The First of t





Inventors:





Title: System and Method for Measuring...

Inventors: Kin Chung Fung et al.

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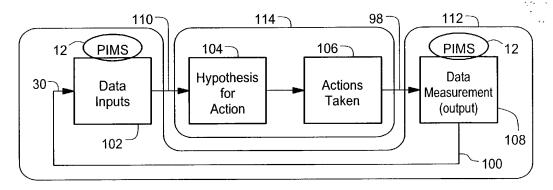


FIG. 6

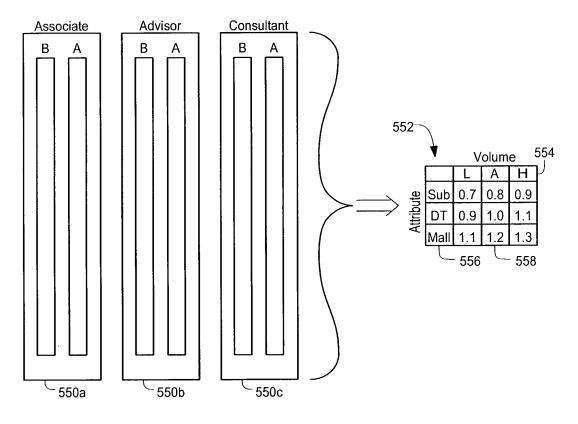


FIG. 10

Docket/App No.: 3183.1000-001

Inventors:

Kin Chung Fung et al.

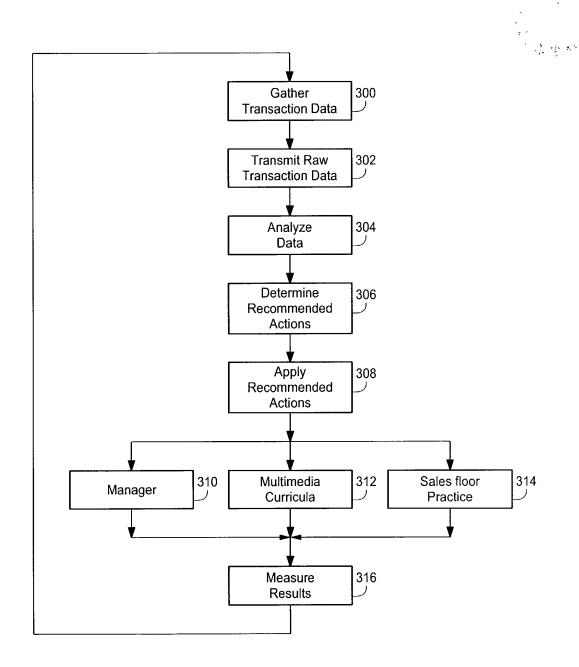
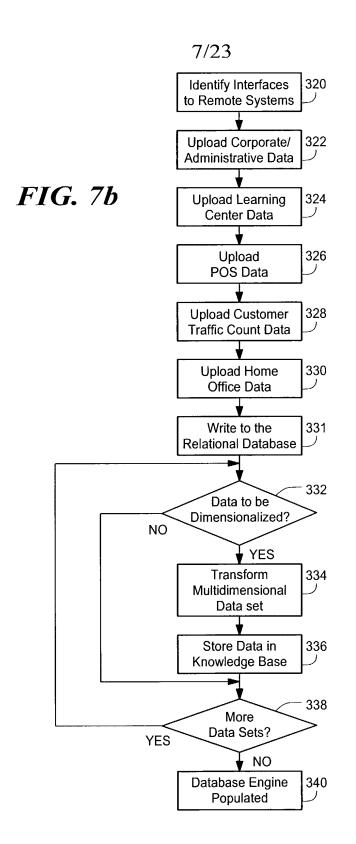


FIG. 7a

Docket/App No.: 3183.1000-001

Title: System and Method for Measuring...

Kin Chung Fung et al. Inventors:



Kin Chung Fung et al. Inventors:

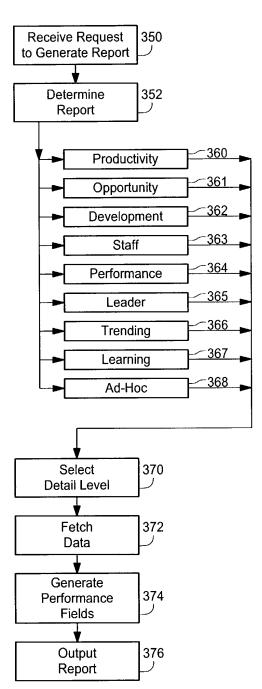


FIG. 7c

Title: System and Method for Measuring...

Inventors: Kin Chung Fung et al.

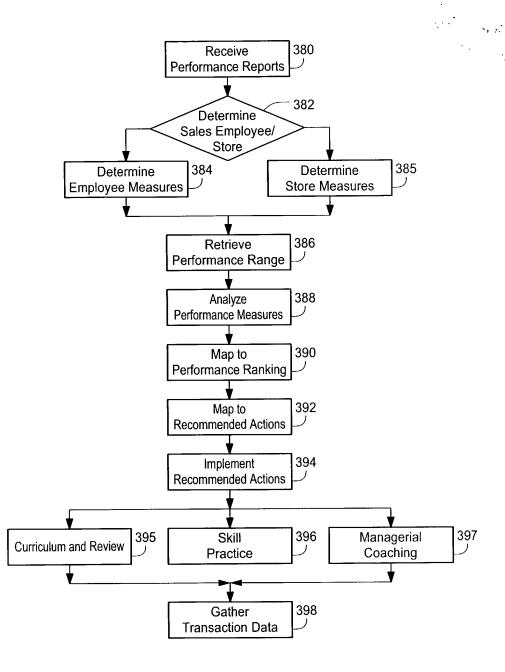
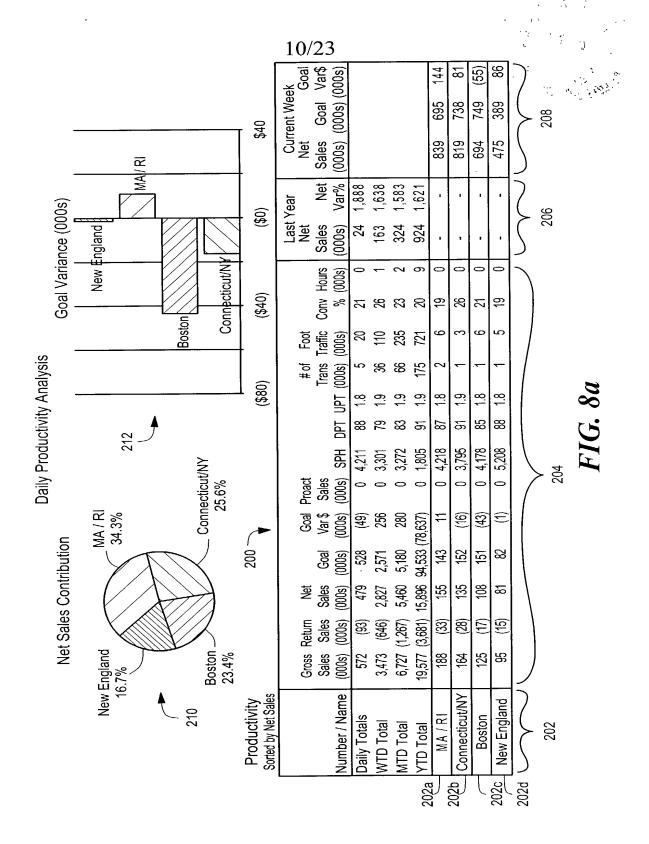


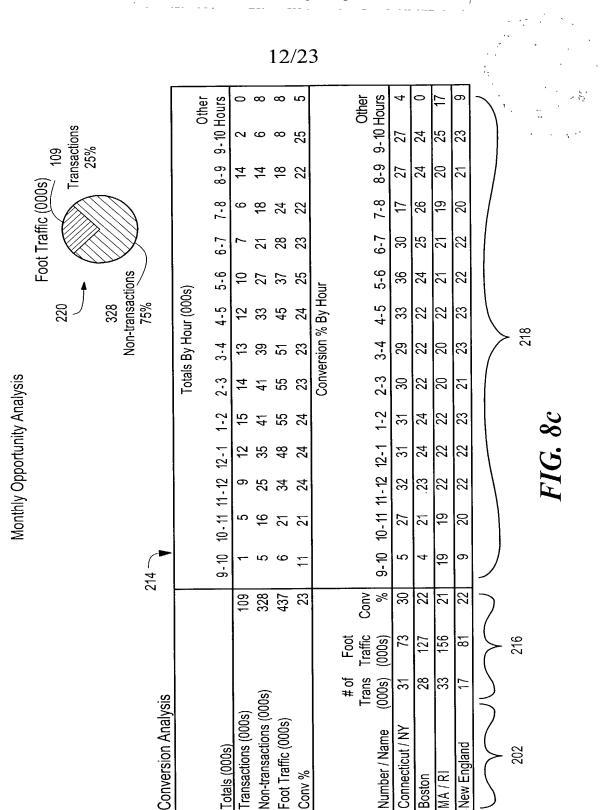
FIG. 7d

Kin Chung Fung et al. Inventors:

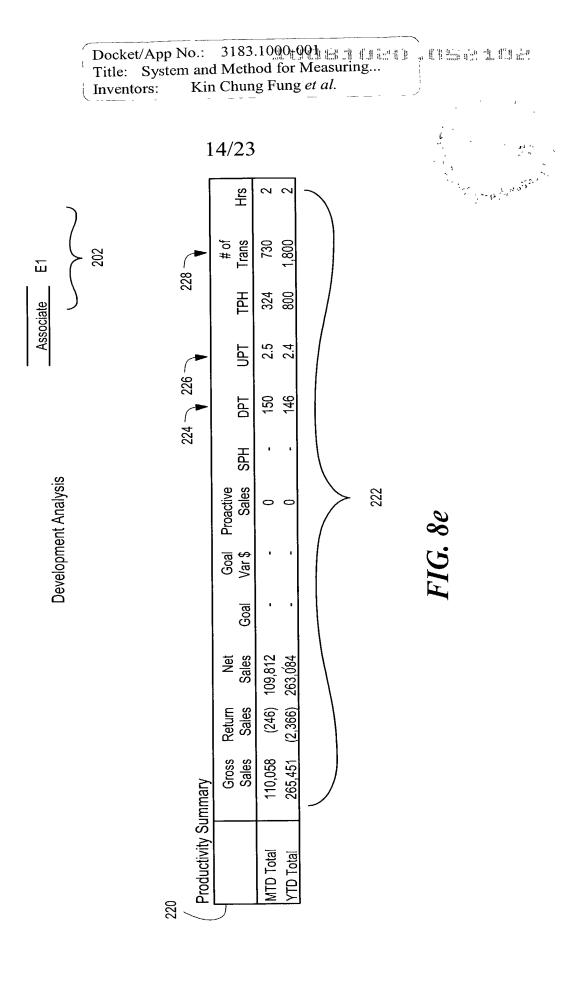


					510			11	./2	23].					
		ates	Week	Goal oal Var\$				•	0		0	0	0	0	0	0	0	0	. i.);;; O	, ı,		
_	_ E2 25%	Other Associates 22.5%	Current Week	Net Goal Sales Goal				97,840	67,391	53,405	58,925	16,597	13,834	9,914	21,977	6,101	7,260	9,434	14,869	5,977	6,648	932	385
butior	26%	Oth Oth	ar	Net ar%	6	19	87																٦
Net Sales Contribution			Last Year	Net Net Sales Var%	89,500	241,400	1,708.000						•										
et Sal	**************************************	3 / 4%		Hours	යි	4	737	0	0	2	0	0	7	0	0	0	0	2	0	0	0	0	0
ž	13.1%	E3 / 13.4%			8	R	8																
	(210		Foot Conv Traffic %	6,295	18,497	99,100																
		_ /	-	# of Trans	1,255	4,372 18,497	1.8 20,876 99,100	290	8	169	178	Ħ	₽	4	R	74	33	9	13	7	13	<u>€</u>	2
(O		504		► ₫	, %:	9:	1.8 2	2.5	2.8	22	21	21	2.1	2.1	1.8	1.8	4.8	3.2	2.5	<u>1.</u>	<u></u>	0.9	1:0
ıalysi		4 502		► PG	19	88	153	\$	145	8	11	88	7	83	හ	84	88	112	88	87	33	23	9
ity An		504		A H	0 1,436	1,999	4,341	•	•	6,179	•	•	394	•	•	١	'	496	•	•	•	•	1
luctiv				Goal Proact	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Weekly Productivity Analysis				Goal \ Var\$		31,531	083,750 (3,884,253)																
Wee		200		<u> </u>	95,156	256,850	7,083,750 (
		4,		S et	86,88	288,381	3,199,497	27,071	26,029	13,903	13,637	7,360	2,854	2,821	2,793	2,096	1,694	1,115	1,104	609	461	436	8
	2			Return	0	0		0	0	89)	0	0	0	0	0	(49)	0	(240)	0	(78)	(911)	(260)	(284)
	FIG. 8b			Gross Sales	113,609	413,261	3,814,448 (614,952)	120,72	26,029	13,971	13,637	7,360	2,854	2,821	2,793	2,136	1,694	1,355	1,104	289	972	966	362
	FI	ctivity let Sales		G G	<u>a</u>		1	e E1	3 E2	E3) E4	E5	9E	3 E7	82	63	e E10	e E11	e E12	e E13	e E14	e E15	ger E16
		Productivity Sorted by Net Sales		Mumbor (Momo	WTD Total	MTD Total	YTD Total	Associate	Store Manager E16														

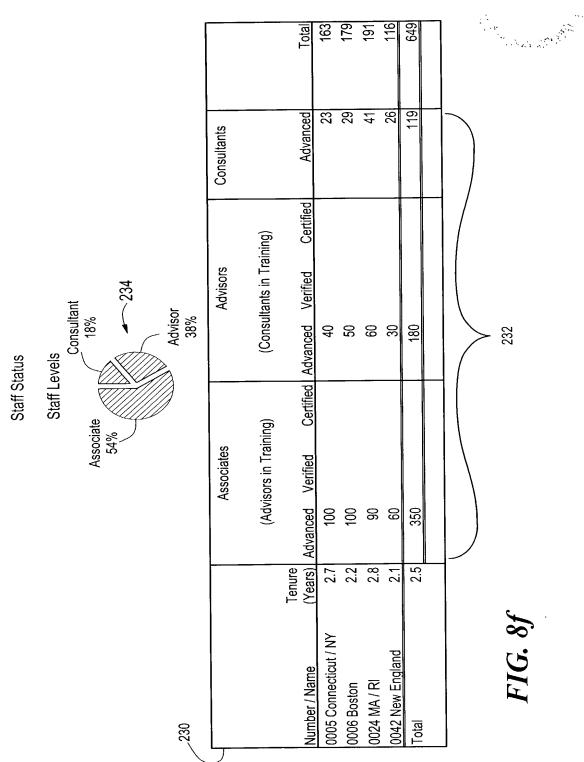
Kin Chung Fung et al. Inventors:



										1	<i>.</i>		•											
	1	-[Other	lours	က	0	09	09	0		Other	ours	0	0	0		0	0	0	0	0	0	0	
				9-10 Hours	-	19	108	127	15			9-10 Hours	က	•	0		•	4	က	•	•	•		·.'
				8-9	-	40	175	215	19			8-9	က	0	_		•	4	9	0	•	•	4	
				7-8	1	73	284	357	20			7-8	2	1	~		•	2	4	0	•		17	
	,			2-9	1	79	385	464	17			2-9	က		တ		•	9	•	0	_	•	24	
		$\ \ $		9-9	~	129	451	280	22	/ Hour		5-6	-	0	တ		•	20	•	0	19	1	78	
- ~		[/]	/ Hour	4-5	-	142	563	705	20	Sales Transactions By Hour	•	4-5	_	0	12		_	22	•	0	24	0	21	
218'	\leq		Totals By Hour	3-4	-	180	675	855	21	ransact		3-4		_	13		0	41	1	0	23	_	13	
/sis			<u> </u>	2-3	0	177	615	792	22	Sales T		2-3		7	15		~	53	•	0	59	0	35	
/ Anal				1-2	0	162	622	784	21	0,		1-2	1	9	∞		0	14	•	0	30	7	43	<i>p</i> 8
rtunity	i			12-1	0	141	435	9/9	24			12-1	•	ဖ	13		0	8	•	0	70	7	32	FIG.
oddo,				11-12	9	88	390	476	18			10-11 11-12	•	က	9		_	-	1	0	23	0	28	FI
Weekly Opportunity Analysis				10-11 11-12	ဖ	25	213	238	11			10-11	•	•	0			•	•	0	=	0	6	
				9-10	9	0	63	83	0			9-10	•	•	0		•	•	٠	•	•	0	•	
						1,255	5,040	6,295	20		ţo#	Trans	13	19	87		4	178	13	0	180	9	260)
		•				•						•						4			7		-	
	217	alysis			ıty				!			Description			_		Associate	Associate	Associate	tore Manager	Associate	Associate	Associate	202'
		Transaction Analysis		Totals	Associates on Du	Transactions	Non-transactions	Foot Traffic	Conv %			Number / Name	000018 Discount	000026 House	000030 Unknown	Associate	E3	E4	E5	E6 S	E2	E7	<u>П</u>	



15/23



16/23

Conv Hours % (000s) 29 18 21 20 # of Trans (000s) 33 33 28 47 83 83 83 238 2,551 (269)Gross Sales Number / Name (000s) 3,326 3,318 2,852 Connecticut / NY MA/RI Boston

Performance Ranking

Docket/App No.: 3183.1000-001

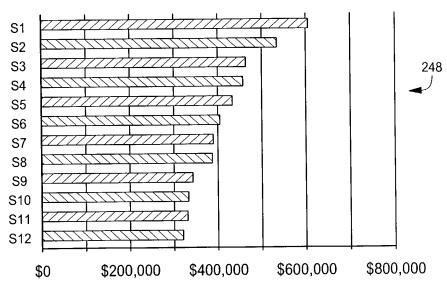
Title: System and Method for Measuring...

Kin Chung Fung et al. Inventors:

17/23

Leader Board

Net Sales



Store	Net Sale
S1	606,93
S2	531,71
S3	461,87
S4	459,17
S5	432,29
S6	405,65
S7	391,96
S 8	388,88
S 9	344,31
S10	332,09
S11	331,60
S12	319,59
	\$1 \$2 \$3 \$4 \$5 \$6 \$7 \$8 \$9 \$10 \$11

FIG. 8h

Inventors:

Kin Chung Fung et al.

18/23

250

Monthly Trending Analysis

Productivity

\ Product	\ Productivity											
Number / Name	2001 Pe Actual	eriod 10 Goal	2001 Po Actual	eriod 9 Goal	2001 P Actual	eriod 8 Goal	2001 P Actual	eriod 7 Goal	2001 P Actual	eriod 6 Goal	2001 F Actual	Period 5 Goal
Total												
Net Sales	8 881 717	9,346,925	27 470	9,802,627	0.	12,077,480	_	6,378,590	_	6,792,985	-	10,244,393
SPH	2,450	- 0,010,020	10	-	0	-	_	-	_	, , , <u>, , , , , , , , , , , , , , , , </u>	_	-
DPT	81	_	96	_	_	_	_	_	_	-	-	-1
UPT	1.9	_	2.2	_	_	_	_	-	_	_	_	-
TPH	30	_	0	_	_	-	_	_	-	-	-	-
Conv %	23	_	1	_	_	-	-	-	-		_	-
Connecticut / NY												
Net Sales	2 596 960	2,711,111	l 0	2,763,975	0	3,418,083	.	1,695,117	_	1,963,114	-	2,958,411
SPH	2,817	-,,	Ō	_,,.	0	, , <u> </u>	-	-	-	-	-	-
DPT	83	_	_	_	-	_	-	-	-	-	-	-
UPT	1.9	_	-	_	-	-] -	-	-	-] -	-
TPH	34	-	l -	-] -	-	-	-	-	-	-	-
Conv %	30	-	0	_	0				-			
Boston												
Net Sales	2,283,313	2,798,237	22,098	3,280,156	0	3,985,591	-	2,156,003	-	2,072,636	-	3,271,754
SPH	2,033	-	38	-	0	-	-	-	-	-	-	-
DPT	81	-	103	-	-	-	-	_	-	-	-	-
UPT	1.9	-	2.3	-	-	-	-	-	-	-	-	
TPH	25	-	0	-	-	-	-	-	-	-	-	-
Conv %	22		1								-	-
MA / RI							1				1	
Net Sales	2,550,825	2,510,361	78	2,500,513	0	3,118,615	-	1,589,860	-	1,706,599	-	- 2,652,819
SPH	3,353	-	0	-	0	-	-	-		-	1 .	-
DPT	78	-	78	-	-	-	-	-	-	-	-	
UPT	1.8	-	1.0	-	-	-	-	-	-	-	.	
TPH	43	-	0	-	-	-	· -	-	-	-	1 .	-
Conv %	21		<u> </u>		<u> -</u>		 -			-	 	
New England												
Net Sales		1,327,216		9,346,925		1,555,191	-	937,610	- ارا	1,050,636	·	- 1,361,409
SPH	1,769		8	-	0	-	-		-	-	· ·	
DPT	83		. 77	-	· -	-	· -		-	-	· ·	
UPT	1.9		2.0		-	-	-		· -		•	
TPH	21		0	-	-	-			-	-		
Conv %_	22	_	- 1	-	· <u>l -</u>		<u></u>	·	<u>· L</u>		·L	

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Title: System and Method for Measuring...
Inventors: Kin Chung Fung et al. 19/23 Last Access Course 05/21/2001 07/23/2001 09/25/2001 257 Computer Date 05/21/2001 07/23/2001 09/25/2001 264 05/16/2001 07/16/2001 09/16/2001 9 100 9 Consultant Level Evaluation Associate Level Evaluation Advisor Level Evaluation 262 Course Description Consultant Level Associate Level Advisor Level Sequence Description 260

> Client Relationship Client Relationship Client Relationship

Curriculum Description 258

교

Associate

Learning History

Inventors:

Kin Chung Fung et al.

20/23

_					
Λ	SS	\sim	\sim 1	2	tΔ

# Trans	UPT	DPT	Action(s)
L	L	L	1+2+3
L	L	Α	1+2
L	L	Н	1 + 2
L	Α	L	1+2
<u> </u>	Α	Α	1+2
L	А	Н	Congratulate on good job with the clients you work with 1 + 2
	Н	L	1+2
<u>_</u>	H	Ā	1+2
Ĺ	Н	H	Congratulate on good job with the clients you work with 1 + 2
Α	L	L	3
Α	L	Α	3
Α	L	Н	3
Α	Α	L	3
A	Α	А	Congratulate on good job 3
A	А	Н	Congratulate on good job 3
Α	Н	L	3
Α	Н	А	Congratulate on good job 3
Α	Н	Н	Congratulate on good job 3
Н	L	L	3
Н	L	Α	3
H	L	Н	3
H	A	L	3
H	A	A	Congratulate on great job
Н	А	Н	Congratulate on great job
Н	Н	L	Congratulate on great job
Н	Н	A	Promotion Candidate
Н	Н	Н	Promotion Candidate

514

1 = Preparing Yourself | 2 = Engaging Client | 3 = Sharing Information 518

FIG. 9a

Docket/App No.: 3183.1000-001 Classification of Title: System and Method for Measuring...

Inventors:

Kin Chung Fung et al.

21/23

Advisor

Advisor			
UPT	# Trans	DPT	Action(s)
L.	L	L	1 + 2
L	L	Α	1 + 2
L	L	Н	1 + 2
L	Α	L	1 + 2
L	Α	Α	1 + 2
L	Α	Н	1 + 2
L	Н	L	1 + 2
L	Н	Α	1 + 2
L	Н	Н	1 + 2
Α	L	L	3 + 2
Α	L	Α	3 + 2
Α	L	Н	3 + 2
А	Α	L	3 + 2
Α	Α	Α	Congratulate on good job
			3
Α	Α	Н	Congratulate on good job
		(3
Α	Н	L	2
A	Н	Α	Congratulate on good job
Α	Н	Н	Congratulate on good job
Н	L.	L	3
Н	L	Α	3
Н	L	Н	3
Н	Α	L	Congratulate on great job
Н	Α	Α	Congratulate on great job
			Possible Promotion for Candidate
Н	Α	Н	Congratulate on great job
ļ			Possible Promotion for Candidate
Н	Н	L	Promotion Candidate
Н	Н	Α	Promotion Candidate
Н	Н	Н	Promotion Candidate
		<u> </u>	<u> </u>

520 L = Low, A = Average, H = High 1 = Understanding Needs 2 = Creating Solutions 3 = Balancing Experiences 522

FIG. 9b

Docket/App No.: 3183.1000-001

Title: System and Method for Measuring...

Kin Chung Fung et al. Inventors:

22/23

	Consultant		2212	
	# Phone	# Appts	# Clients	Action(s)
524	Contacts			
	L	L	L	1 + 2
	L	L	Α	1 + 2
	L	L	Н	1 + 2
	L	A	L	1
	L	Α	Α	1
	L	Α	Н	2 + 1
	L	Н	L	1
	L	Н	Α	Congratulate on working well proactively with client; find out why low phone contact
	L	Н	Н	Congratulate on working well proactively with client; find out why low phone contact
	Α	L	L	2 + 1
	Α	L	Α	2
	Α	L	Н	2
	A	Α	L	2 + 1
	А	Α	Α	2
				Congratulate on good job
	Α	A	Н	2
				Congratulate on good job
	Α	Н	L	2+1
	Α	Н	Α	2
				Congratulate on good job
	Α	Н	Н	2
				Congratulate on good job
	Н	L	L	2+1
	Н	L	Α	2
	Н	L	Н	2
	Н	Α	L	2+1
	Н	А	Α	2
				Key player to leverage & possibly promote
	Н	A	Н	2
	ļ			Key player to leverage & possibly promote
	Н	Н	L	Key player to leverage and promote and find out why low clients
				1
	Н	H	A	Key player to leverage and promote
	Н	Н	Н	Key player to leverage and promote

L = Low, A = Average, H = High

1 = Offering Services | 2 = Delighting Clients | 3 = Driving Business

3183.1000-001 Docket/App No.:

Title: System and Method for Measuring...

Kin Chung Fung et al. Inventors:

23/23

Level:

Store

528	Usage of DCE Tools	Sales Associate Issues	Team Composition	Action(s)
	N	L	L	Congratulate on good job 3
	N	L	Α	Congratulate on great job
	Z	L	Н	Congratulate on good job 3
	N	Α	L	3
	N	· A	Α	No action - watch for improvement
	N	Α	H	3
	N	Н	L	2 + 3
	N	H	A	2
	N	Н	<u> </u>	2+3
	Y	L	LL	1+3
	Y	L	A	1
	Υ	L	H	1+3
	Y	Α	L	1+3
	Y	Α	Α	1
	Y	Α	H	1+3
	Υ	Н	L	SM needs immediate help. 1 + 2 + 3
	Y	Н	Α	SM needs immediate help. 1 + 2
	Y	Н	Н	SM needs immediate help. 1 + 2 + 3

N = No, Y = Yes

L = Low/Under staffed, A = Average/Appropriately staffed, H = High/Over staffed

1 = Phone SM and schedule store visit to dicuss learning tools
2 = Plan store visit and coach SM to prepare individual development plan
3 = Plan quarterly/semi-annual store visit to review personnel strategy and development plan

FIG. 9d